Microsoft Office SharePoint Server 2007
An Introduction to Managing Your Web Content

Prepared for the

NIH Scientific Interest Groups

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PART I: INTRODUCING MICROSOFT OFFICE SHAREPOINT SERVER 2007

About This User's Manual

You are reading the Microsoft Office SharePoint Server 2007 (MOSS) Web Content Management Sites User Manual. This User's Manual provides information regarding the workflow, roles and tasks of individuals that create, edit and publish website content.

Notes for This Manual

A few notes and warnings are used throughout this guide, allowing you to complete certain tasks effectively. These notes have different degrees of importance as follows:

RULES TO REMEMBER: Vital protocol that must be followed throughout the workflow.

TERMINOLOGY TO REMEMBER: Important information for specific tasks.

NOTE: Tips for completing tasks.

WHAT HAPPENS NEXT: Contains summarized information for current role in regards to next steps in workflow.

Benefits of MOSS Web Content Management Sites

There are many reasons why the use MOSS 2007 is beneficial to NIH. Some of the reasons include:
- Centrally housing all web resources at one location makes it easier to manage IT staffing resource and technical expenses.
- Microsoft Office SharePoint Services uses a shared set of technical resources. No longer does an organization need many web tools to manage website content.
- Design and content uniformity can be guaranteed with MOSS 2007 due to the consistent use of Style Sheets and Templates.
- Websites in SharePoint are web-accessible for adaptive technologies such as screen readers. Web accessibility and Section 508 compliance is mandated by the U.S. Federal Government.
- Creating content for a webpage is similar to writing up a word processing document in Microsoft Word or Corel WordPerfect. Using Microsoft Internet Explorer, a user is provided tools to create, approve, edit and publish pages for a site. There is no need to utilize an HTML program such as Dreamweaver or FrontPage.
- Contributors given access to MOSS 2007 can only manage content in their section(s). They do not have access to other departmental areas of a website.
- Roles within the workflow ensure the highest level of security.

Intended Users

The Scientific Interest Group (SIG) websites are intended for the following users:
- NIH Community
- Internet Viewing Public (Including Outside Affiliated SIG Members)
- SIG Coordinators

- OD/OIR Project Manager(s)

Minimum Requirements

MOSS will work with Internet Explorer 7.0 or earlier, as well as, Mozilla Firefox 1.6 and higher, Safari 2.0.

Workflow Roles

There are four roles that make up the MOSS 2007 workflow. They are:
- Administrator (Owner)
- Contributors (Members)
- Approvers
- Visitors

View the following table for descriptions and permissions for each role in the workflow. **Roles** in MOSS 2007 are designed to create a workflow. A **Workflow** is the process used to group people together in publishing and managing web content for an organization's website.

Workflow provides an overview of how people at NIH can create pages without HTML experience, control when pages are made available for viewing, and who can view them.

Role	Description	Workflow Permissions
Administrator (Owner)	• Acts as the sole authority on the structure and design of the site and its templates • Sets permissions of other users of the site • Is not involved in the routine maintenance of a website.	• They have all rights and therefore can be identified as a Super User.
Contributor (Members)	• Adds, edits, deletes and submits content pages for approval	• Submit for Approval
Approver	• Approves and rejects page content • Publish pages to production site	• Approve/Reject • Publish/Unpublish • Edit
Visitors	• Browses the site to view the contents where the member has rights.	• Read only access

Core Terminology

For Administrators:

Templates: A template enforces a specific design throughout a website. Templates allow for dynamic content creation on a website.

Publishing: Web pages must be published in order for Members to view them.

For Contributors:

Web Parts: The Web Parts allow Contributors to add text and/or images to the text boxes in order to create web content.

Checked In to Share Draft: When a Web page is Checked In to Share, it is only visible to users with certain access permissions. The page will need to be checked in, approved and published before Members can view the Web page.

Submit for Approval: Web pages need to be submitted for approval before they can be published.

For Approvers:

Approved: When a Web page is approved, it can be published.

Publish: Web pages that are published can be seen by Members of a SIG.

Unpublish: When a document is unpublished, it cannot be seen by Members of a SIG.

PART II: LOGGING INTO THE MOSS 2007 SITE

Login Privileges

When creating and editing a website in MOSS 2007, only certain roles have permissions. They are:
- Administrators
- Contributors
- Approvers

See Part I, Workflow Roles for description and permission values for roles.

Visitors do not have login privileges into MOSS 2007.

Login to MOSS Server

Login Steps for Macintosh Users
1.   For Administrators, open your browser and in the address line, enter: http://auth.sigs.nih.gov.
2.   For Contributors, open your browser and in the address line, enter http://auth.sigs.nih.gov/<SIG Name>, where <SIG Name> is the name of your SIG, for example, http://auth.sigs.nih.gov/chemistry.
2.   An authentication dialog box will appear. Enter in your **NIH User Name** and **Password**.
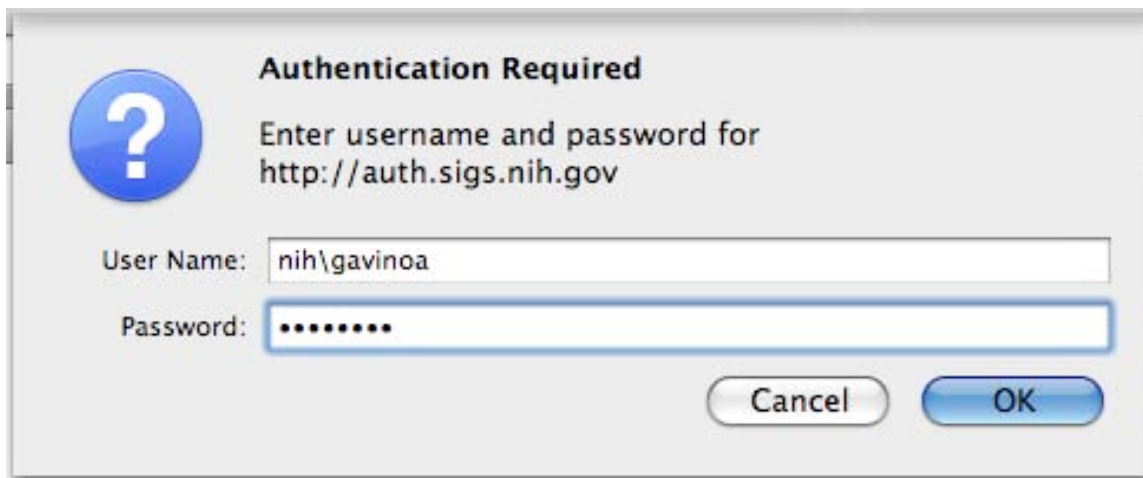

Figure 1

3.   Select **OK**.

- A users domain name should be WinNT://NIH unless otherwise noted.
- MOSS 2007 uses the standard NIH login credentials. This means that end-users can enter their NIH username and password information.

Now that you have logged on to MOSS, you can create, edit or approve website pages, depending on your role. Please see the table of contents in order to go to your respective role sections in the manual for task steps.

PART III: ADMINISTRATOR ROLE – CREATING A SITE

Creating a Site

When creating a site, administrators have the ability to name it, provide a website address and provide access permissions. Those details will be given in this lesson.

Rules to Remember
- Only an administrator can create a website.
- Once a website has been created, Contributors with permissions can edit, create and submit pages within the site.

Steps:

1. Login to MOSS 2007. See Part II, Logging into the MOSS 2007 Site.

2. On the main page of MOSS, click on the **Site Actions** menu located in the right-hand corner of the site.
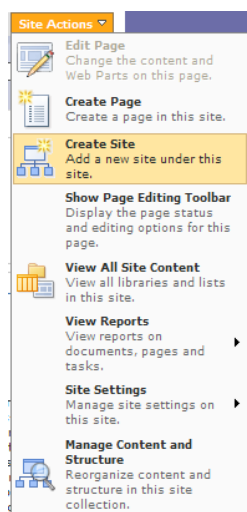
3. In the Site Actions menu, choose **Create Site**.

Figure 2

4. On the New SharePoint Site page, enter in the following information pertaining to the site:
   - Title and Description of website
   - Web Site Address
   - Template Selection
   - Permissions
   - Navigation Inheritance

Figure 3

A. **Title and Description**
The title will be displayed on each page in the site. A title is required. The description helps users to understand the purpose of your site. Input of text for a description is optional.

B. **Site Address**
Users will be able to get to the website using the site name that you provide. The name should be short and easy to remember.

Your site name follows after the http://sigs.nih.gov web address.
Example: http://sigs.nih.gov/*sitename*

C. **Template Selection**
To create a new site using the NIH template, you should select on the **NIH Publishing** tab. After clicking onto the tab, select the template titled, **NIH SIGS.**
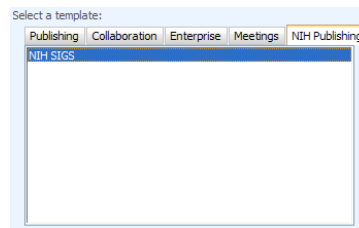
D. **Permissions**

Always choose **Use unique permissions**. This will enable the Adminstrator of the site to set permissions that will apply only to this site.

E. **Navigation Inheritance**
Choosing Yes or No will not disrupt the Creation of the site at all. Therefore, keep **Yes** marked as the default and progress with creating the site.

5. Once information is entered, choose the **Create** button at the bottom of the screen.

6. Next, you can set permissions for the website. Once you do, choose **OK**.

Figure 4

7. MOSS will take the information and arrange it to build the site.

Once built, the homepage for the website will appear on the screen. The six default navigation links on the left-hand side of the page cannot be changed. They are:

- Meetings and Seminars
- Member List
- Member Bulletin Board
- Archives
- Join/Quit the SIG
- Miscellaneous
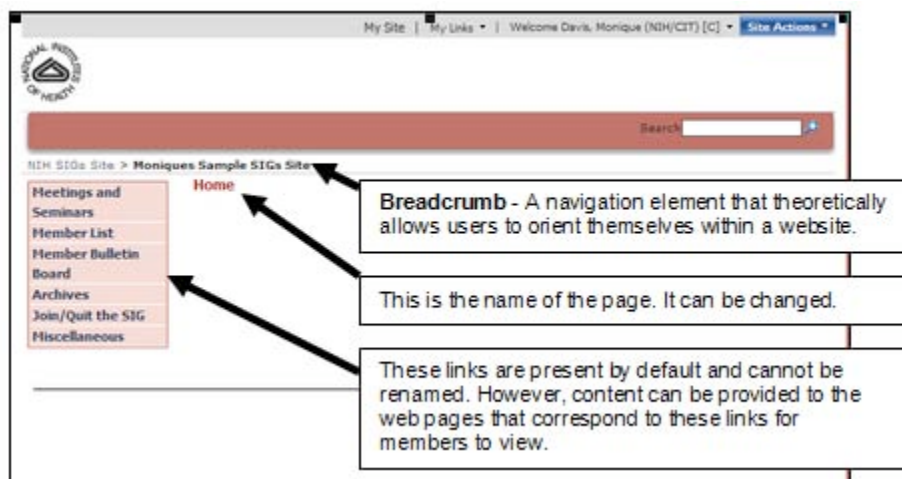
Figure 5

Although the name of the links cannot be changed, content can be added to their pages by a Contributor. Information regarding Contributor tasks can be found in Section IV of this manual.

Modifying Site Settings
Administrators have permissions to change website settings.

Steps:
1. To see all site settings that can be changed, go to **Site Actions > Site Settings > Modify All Site Settings**.

2. There are several categories in which changes can be made to the website. They are:
   - Users and Permissions (A)
   - Look and Feel (B)
   - Galleries (not used)
   - Site Administration (not used)

Each genre listed above will be described in this section.

Figure 6

Users and Permissions

Administrators apply permissions to individuals for the workflow. Therefore, the listing of contributors, approvers and members is in a controlled environment.

Setting Workflow Permissions

1. After logging onto the MOSS 2007 website area, go to **Site Actions > Modify All Site Settings > Site Settings**.
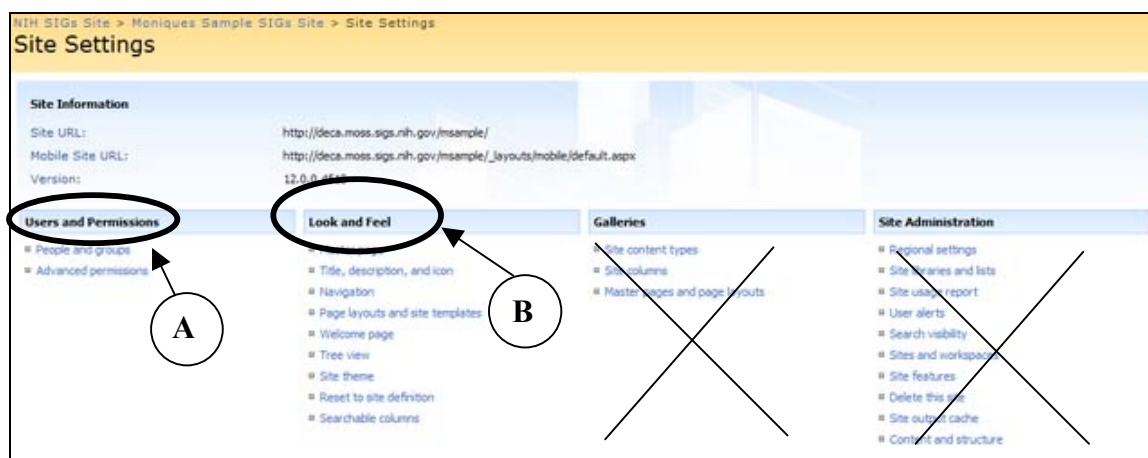
2. Under the Users and Permissions heading, select **People and groups**.
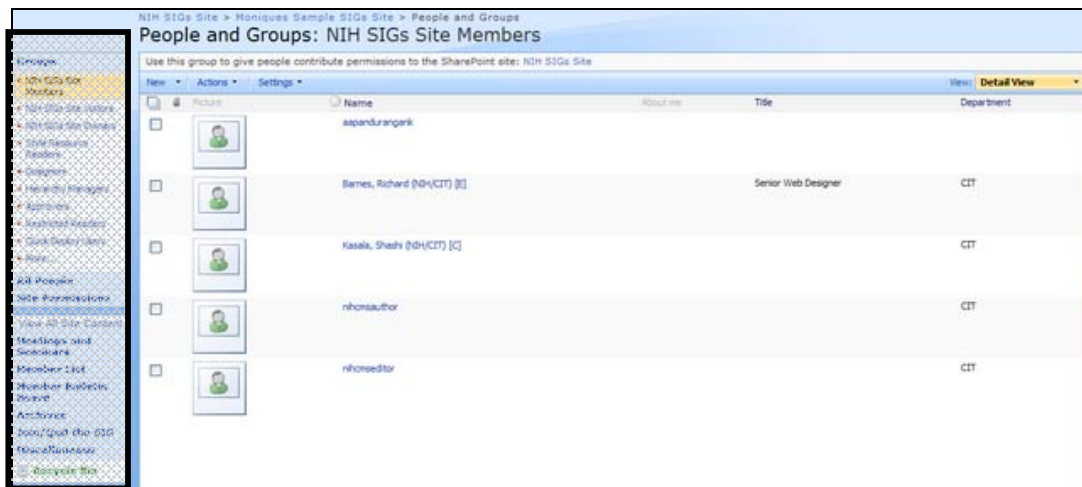
Figure 7

3. In the Groups panel on left side of page, click on desired group to see listing of individuals with specific permissions. For listing of workflow role (group) permissions, see Section III, Workflow Roles in this manual.

4. To add an individual to a group, select desired group from the panel.

5. Click **New > Add Users**.
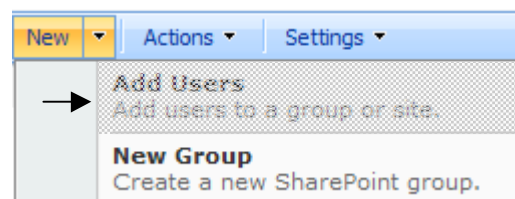
Figure 8

6. Add users by typing in their NIH network usernames in the usernames box. Then click on the Check Names icon button on the lower right hand of the box. You can add one individual or multiple individuals if several people will act in one role.

Separate multiple individuals with a semi-colon. Note: The Browse icon button is not supported on Macs.

Figure 9

7. Next, choose the permissions you want the user(s) to have by clicking on the drop-down menu.

8. (Optional) You can send a personalized e-mail to the new users in their role. Links and information pertaining to the site will be automatically generated by MOSS 2007 and added below your personal message. See sample image below.
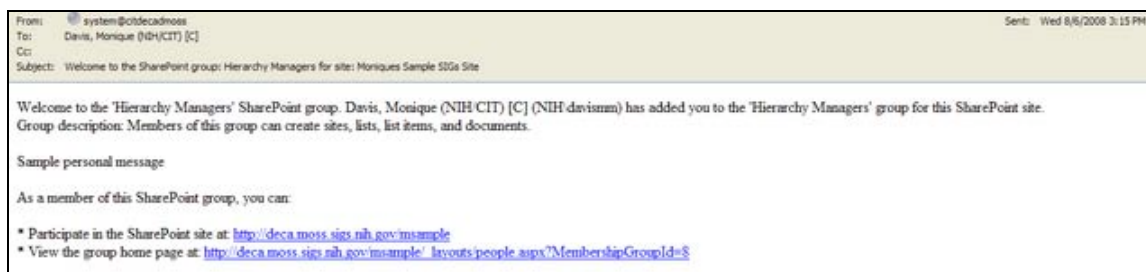
Figure 10

9. Once users and permission information have been added, select the **OK** button. The system will generate an email and send it (if the option was chosen) to the appropriate person(s).

Deleting Users and Permissions

To delete a user from a particular group with specific permissions, do the following:

1. Select the specific group from left-side panel.
2. Find person in group and select them by inserting a checkmark in the box next to their profile.

3. Next, go to **Actions > Remove Users from Group**.
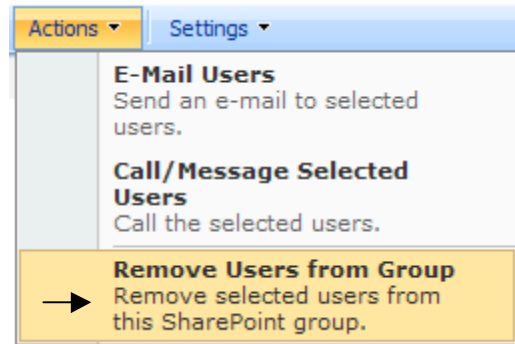
Figure 11

4. A dialog box will appear asking if you want to remove the individuals from the group. Select **OK** or **Cancel**.

5. Once OK is selected, the name is deleted from the group and the user no longer has their previous permissions.

Look and Feel

This section contains links to pages that affect how the site appears and behaves. A site comes with a set of themes that enable you to quickly change the appearance, based on the Interest's groups' needs.

Applying a change does not affect the layout or content of your site.

Steps:

1. On the **Site Actions** menu , click **Site Settings** then on **Modify All Site Settings**.

2. Under **Look and Feel**, click **Master page**.

3. On the Site Master Page Settings, **click on the drop-down menu** in the Site Master Page section.

4. Select a new SIGS master page from the Site Master Page section. There are six (6) SIGS master pages. The description of the new page looks are within the title. A SIG master page is always indicated by the word SIGS at the beginning of the file.

• If SIGS is not at the beginning of your choice of master pages, it cannot be used to change the look of a website.

Example: SIGS_BrownGlassBand.master is a new look for a SIGS page.

5.   Insert a checkmark in the Reset all subsites to inherit this Site Master Page setting box.

Site Master Page Settings

Use this page to review current settings or to assign a different Site Master Page, System Master Page or Alternate CSS URL for this site. Show me more information.

Site Master Page
The site master page will be used by all publishing pages. Choose the first button to inherit the site master page for this site from the parent site. Choose the second radio button to select a unique master page for this site. Check the box to apply this setting to all sub-sites.

○ Inherit site master page from parent of this site
⊙ Specify a master page to be used by this site and all sites that inherit from it.

SIGS_BrownGlassBand.master ▾

#4, Choose a different look for the website by exposing the drop-down menu options.

#5, Insert a checkmark to reset all subsites to inherit the settings.

$Resources:MasterPage_BrownGlassBand_Description

☑ Reset all subsites to inherit this Site Master Page setting
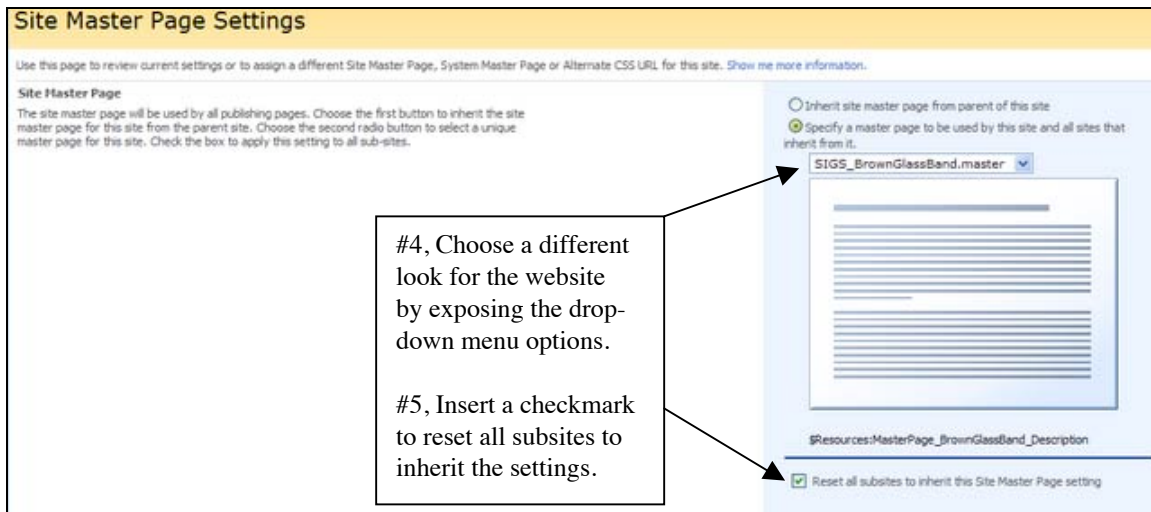
Figure 12

6.   In the System Master Page section, choose the same SIGS master page that you picked in the Site Master Page section.

7.   Also, insert a checkmark in the box that says to Reset all subsites to inherit this system mast page setting.
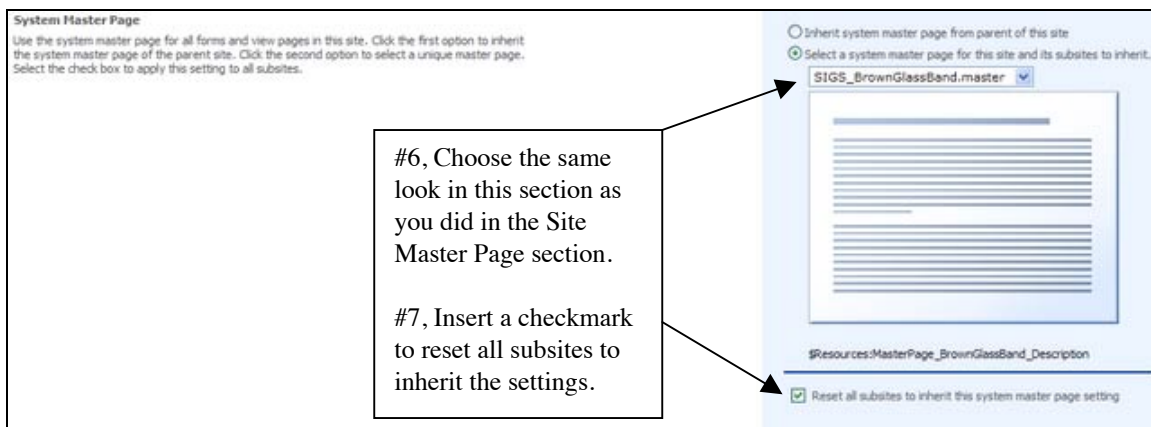

System Master Page
Use the system master page for all forms and view pages in this site. Click the first option to inherit the system master page of the parent site. Click the second option to select a unique master page. Select the check box to apply this setting to all subsites.

○ Inherit system master page from parent of this site
⊙ Select a system master page for this site and its subsites to inherit.

SIGS_BrownGlassBand.master ▾

#6, Choose the same look in this section as you did in the Site Master Page section.

#7, Insert a checkmark to reset all subsites to inherit the settings.

$Resources:MasterPage_BrownGlassBand_Description

☑ Reset all subsites to inherit this system master page setting

Figure 13

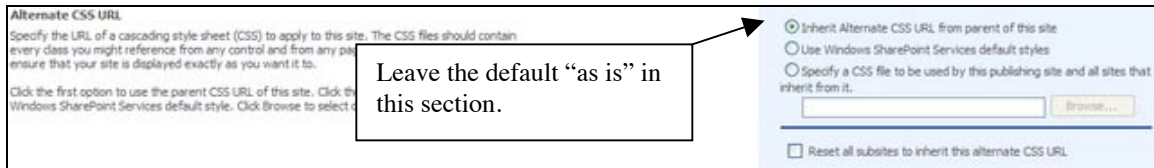8.   In the Alternate CSS URL section, leave all defaults.

Alternate CSS URL

Specify the URL of a cascading style sheet (CSS) to apply to this site. The CSS files should contain every class you might reference from any control and from any page to ensure that your site is displayed exactly as you want it to.

Click the first option to use the parent CSS URL of this site. Click the Windows SharePoint Services default style. Click Browse to select a

Leave the default "as is" in this section.

○ Inherit Alternate CSS URL from parent of this site
○ Use Windows SharePoint Services default styles
○ Specify a CSS file to be used by this publishing site and all sites that inherit from it.

[Browse...]

☐ Reset all subsites to inherit this alternate CSS URL

Figure 14

9.   Choose **OK** to change the look of the website.

Galleries

This section contains links to pages where you can manage the building blocks that you can use to create sites and pages. As of right now, NIH Administrators are not using this section to help build SIG websites.

Site Administration

This section contains links to pages where you can modify administrative settings for the site collection. As of right now, NIH Administrators are not using this section to help build SIG websites.

PART IV: CONTRIBUTOR ROLE– CREATING, EDITING AND SUBMITTING CONTENT

Editing Content

Editing refers to the process by which a page is altered. When editing is done by a Contributor, those changes are not seen by the public until the pages have been approved by the Approver in the workflow.

Rules to Remember
- Once a website has been created, Contributors with permissions from an Administrator can edit and create pages within a website.

Terminology To Remember

Checked In – Once edits are made and you want team members to see the draft, you can check the web page in by choosing the Check In to Share Draft button. Once checked in, you cannot edit unless it is checked out again. The webpage can be checked out by choosing Site Actions > Edit Page or the Edit Page button.

Checked Out – By default, when creating or editing a webpage, it is in Checked Out status. This simply means that while editing, others cannot see the updates.

Status – Provides information about Checked In and Out web pages.

Editing the Home Page and Default Links

1. Login to MOSS 2007. See Part II, Logging into the MOSS 2007 Portal.

2. In order to edit content and Web Parts, you need to choose the desired link to access a specific page.

3. Once the page appears, proceed to the **Site Actions** menu and choose **Edit Page**.

The Home Page is the default page after logging onto MOSS 2007. Therefore, to edit the page, go to **Site Actions > Edit Page**.
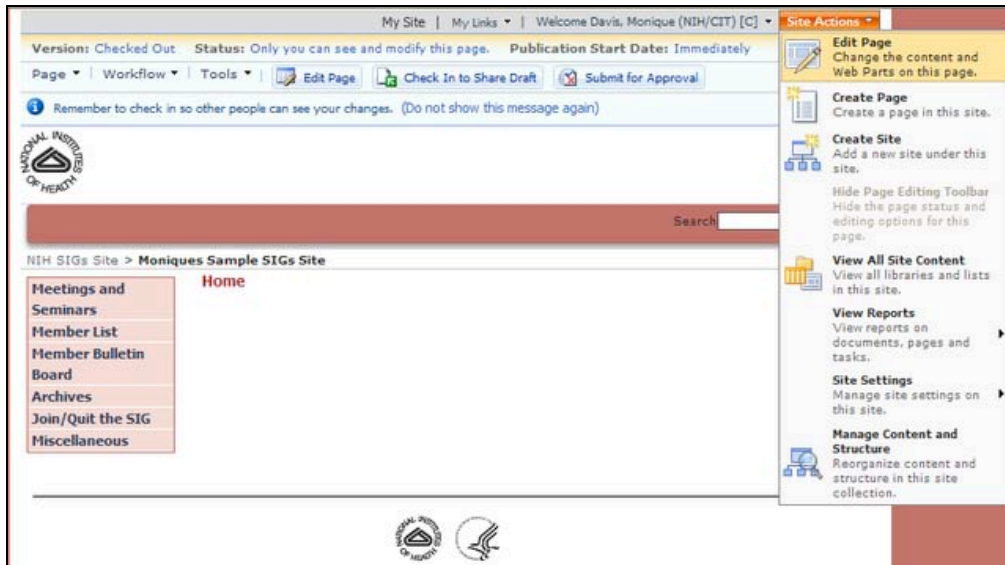
Figure 15

4. Once Edit Page is chosen, the Web Parts of the page appear in sections. This allows you to type or copy and paste information into the section.

5.
Change the Title of a page by clicking into the **Title Web Part** text box.

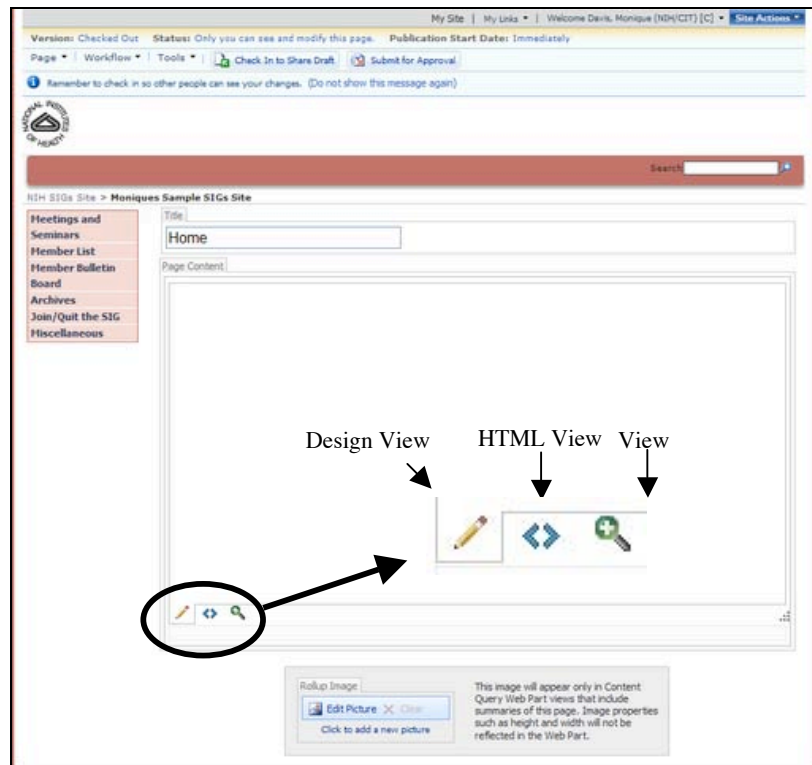The title will appear as a heading on the main page of the website.

Figure 16

6. Click into the **Page Content** section. Here, enter text in either Design or HTML view. (Note: Images can be added and are shown in the next section of this manual.)

Design vs. HTML View
If you use HTML view, you must know HTML syntax to input
text and images correctly. Therefore, if HTML is not known, use the Design
view, which is the default view.

Should I Type or Copy/Paste Information?
Contributors can type information into Web Parts or Copy and Paste informatio
from a document into Web Parts.
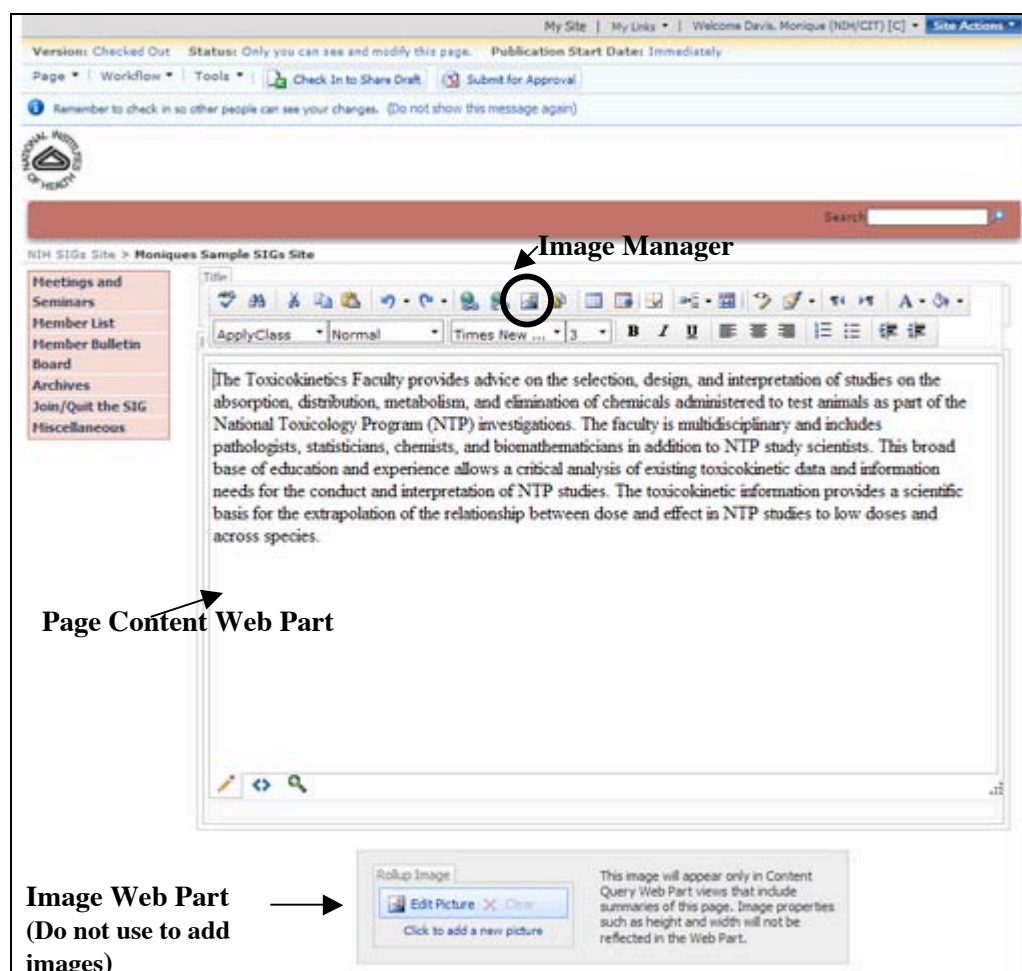
Figure 17

7. Once you are done entering text on a page, go to **Page > Save**.

Inserting Images

You can use the Image Manager button on the toolbar to add a picture or graphic to the Page
Content Web Part. Images can be solo in a Web Part or combined with text. Furthermore, you
can control the vertical alignment, horizontal alignment, and background color of the image
inside the Image Web Part by modifying its custom properties.

You can use the Image Manager to:

-Add a department or project logo to a page.

-Display photos of employees or products.

-Make the page more visually appealing.

1. Navigate to the page where you want an image placed.

2. Select the Image Manager ![icon] button on the toolbar.

3. An Image Manager dialog box appears.
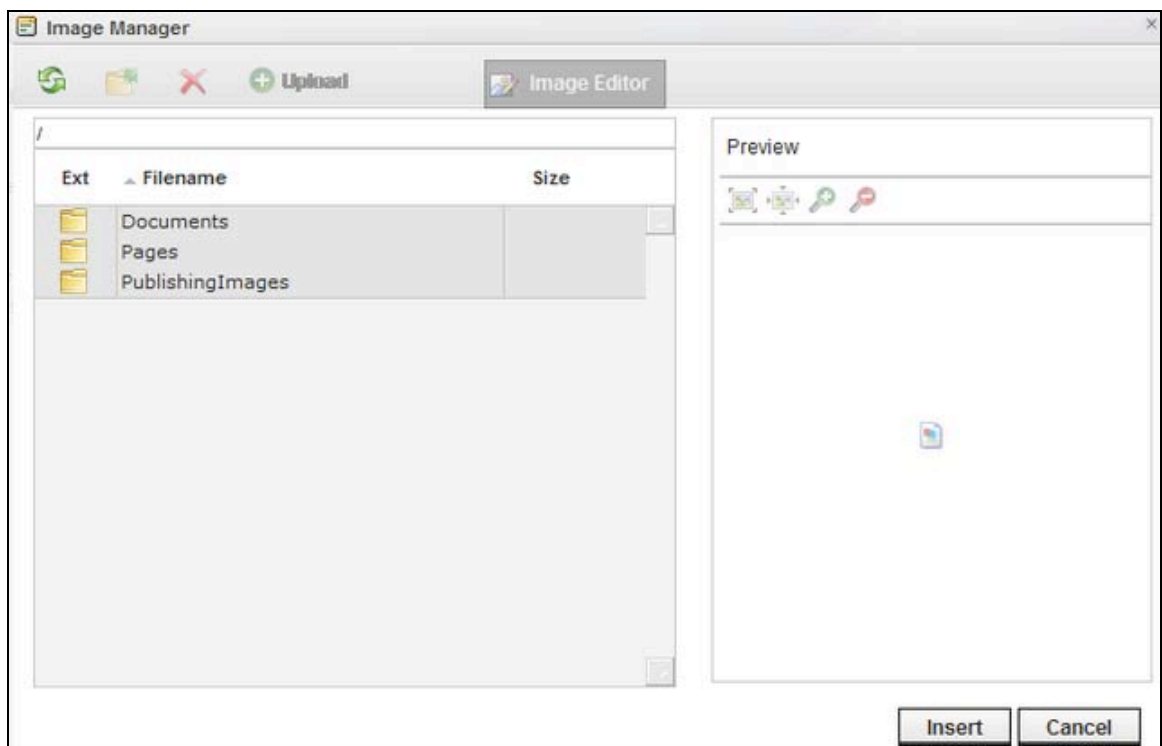
Figure 18

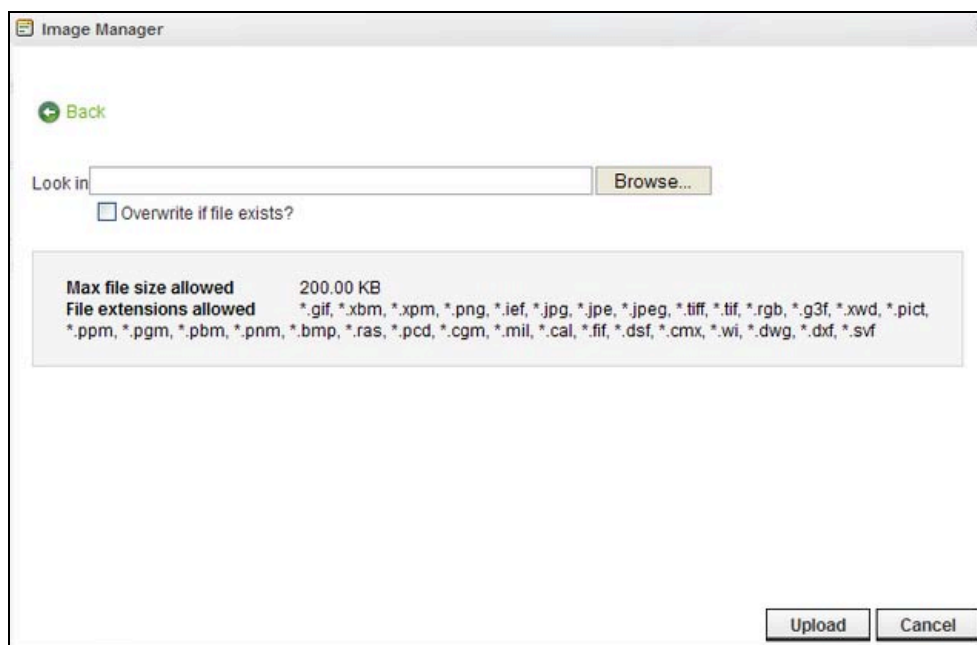2. Double-click on PublishingImages, then Choose **Upload**.

Figure 19

3. Next, click **Browse** to locate an image on your computer. Once an image is found, click the image. The file path will appear. Choose the **Upload** button (Beside the Browse button. Choose it even if it is grayed out).

4. A preview of the image will appear on the right side of the Image Manager. If editing of the image is not necessary, skip step #5 and go to step #6.
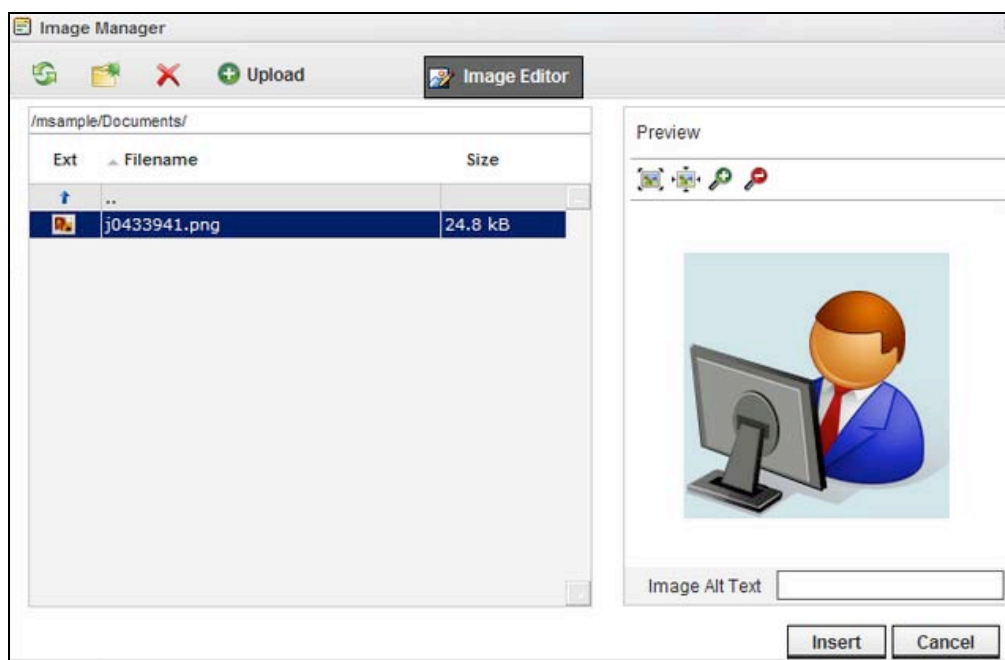
Figure 20

5. (Optional) If you need to edit the image, click **Image Editor**. You can change settings for opacity, image size, orientation and cropping. If changes are made, enter the name of the

file in the Save As box. You may choose to overwrite the same file or create a new file. Choose **Save.**
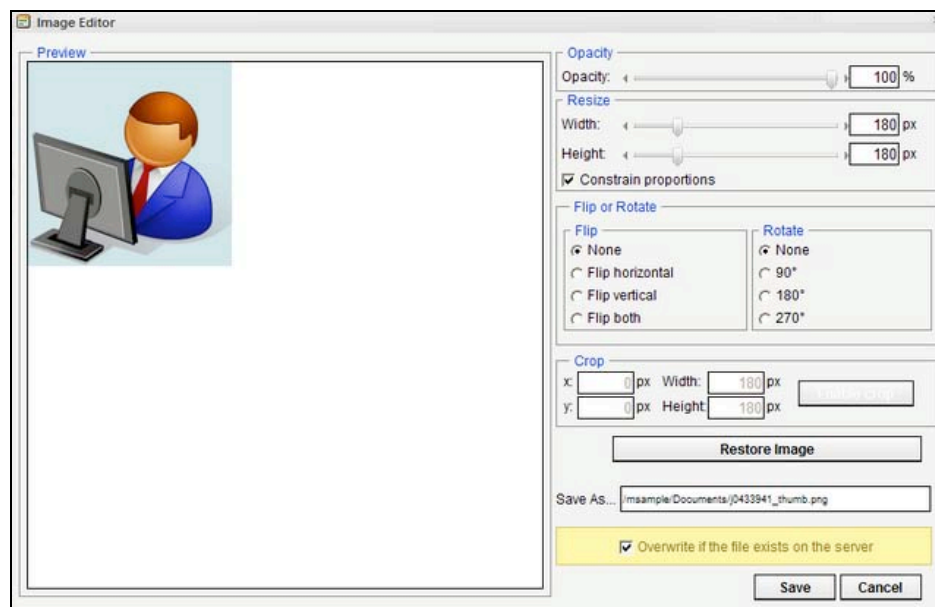
Figure 21

6. Due to hearing-impaired compliant measures, enter in a short description of the image in the **Image Alt Text** field. Alternate Text specifies the text to display when a user rests the mouse pointer over the image. This text appears when the image is not available. However, please keep it short for the screen readers. See example below.

Example: Alternate Text description -

NIH employees sitting at a table having a meeting.

7. Choose the **Insert** button. The image will now show on your page. It can be moved to a specific portion of the page by clicking and dragging the image to a desired spot.
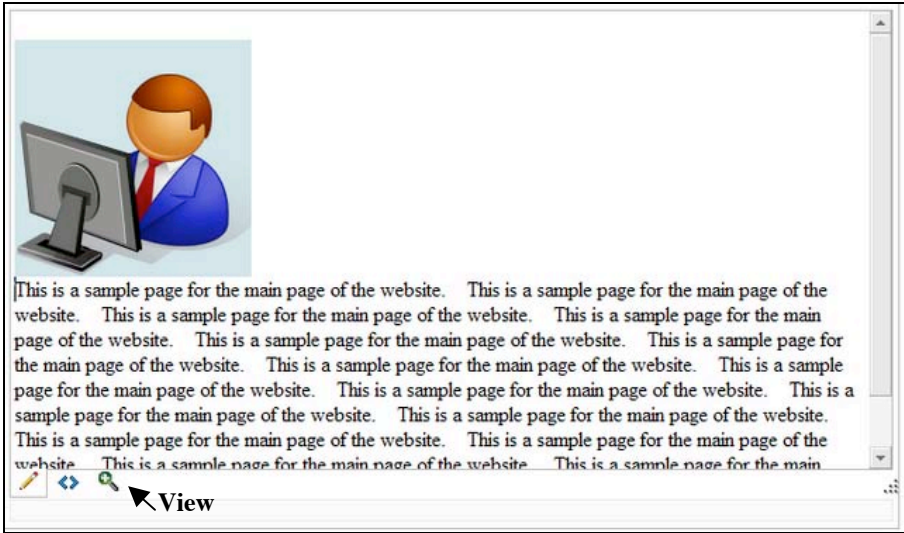
Figure 22

8. Once done, click the **View** icon 🔍 , located at the bottom of the Page Content Web Part to see how it will look on the Web.

9. To save work, go to **Page > Save**.

Creating a New Page

Anytime a new page needs to be created, you should always go to the Site Actions tab to view the pull-down menu. Access to the Site Actions tab can be on any screen within MOSS 2007. You do not need to be on the homepage of the website.

When creating a new page, you essentially are adding a new navigation link to the website for members to eventually view.

1. Click the **Site Actions** menu to view the pull-down menu.

2. In the Site Actions menu, choose **Create Page**.

Figure 23

3. On the Create Page section, enter in the following information pertaining to the page:
   - Title of the page
   - Description of the page
   - URL Name for page
   - Choose a page layout

See descriptions of the page content above in Section IV, Editing Content.

Figure 24

Once information is entered, the following can be done:
   - **Check Spelling** – Checks for spelling errors in Title and Description

section
- **Create** – Creates the new page with the properties entered on the page
- **Cancel** – Cancels the page creation

4. If spelling is checked or not checked, select the **Create** button to create page.

5. The layout for your page is now complete. Now, it is time to add text and pictures to your Page. Refer to Part III, Editing a Page for instructions.

Publishing Web Pages

Once a Contributor creates and/or edits a web page, the page can be published by choosing the Publish button.
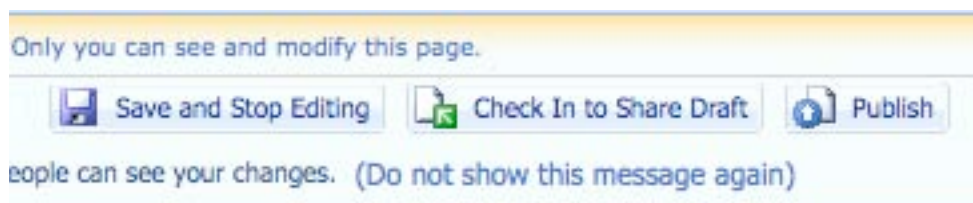
Submitting Web Pages for Approval

This section is applicable only if the SIG site Administrator has set up an Approvers group and an approval workflow on the site.

Once a Contributor creates and/or edits a web page, the content must be approved by an Approver before it is seen publicly by members.

Contributors can submit one or multiple pages to an Approver. The Approver will receive an email indicating that there are pages that need to be approved. Once approved, the pages are published by the Approver and seen on the website by members.

1. After a Web page is saved after being created and/or edited, click ![Submit for Approval] on the Page Editing toolbar.

- If the **Page Editing** toolbar is not visible, on the **Site Actions** menu, click **Show Page Editing Toolbar**.

- When clicking Submit for Approval, it does not do a bulk submittal for all the pages you may have edited. Therefore, you will have to go each page edited and click on the Submit for Approval button.

2. A dialog box appears. If you need to send a message to add an Approver, cc: and individual and/or send a message about the page being submitted, you can do so on this page. Otherwise, click **Start** at the bottom of the page.

Figure 25

3. Once the request has gone to the Approver, if you navigate to the page sent, the Status at the top of the screen will be **Waiting for approval**.

Figure 26

What Happens Next?

When the Start button is selected, the Approver receives an email notifying th of a page that needs to be approved and published. Once a page is approved, i automatically published for Members to view.

If a page is not approved, the changes are not seen by Members and the old pa continues to display on the website.

## PART IV: APPROVER ROLE – APPROVING CONTENT FOR A WEBSITE

This section is applicable only if the SIG site Administrator has set up an Approvers group and an approval workflow on the site.

Approver Responsibilities

Approvers have the ability to approve content by which Contributors provide. When an Approver approves a page, it is simultaneously published for members of the particular SIGS group to view.

As an Approver, you can:
- Edit Page
- Approve
- Reject
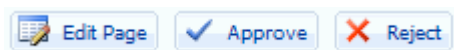
Rules to Remember
- When there is a page that needs to be approved, Approvers for the website will receive an automatic email from MOSS indicating an approval needs to be made.
- Once a website is approved, Members can view the updates on the website.
- Contributors will receive an email from MOSS indicating a page has been approved and published.

Terminology To Remember

Approve – A page has been approved by an Approver.

Rejected – A page has been rejected by an Approver. If needed, the Contributor will need to make changes and resubmit it again.

Published – A page has been approved and thus published to the SIGS website.

Approving Content

1. Once you receive an email to approve a page, login to MOSS 2007. See Part II, Logging into the MOSS 2007 Portal.
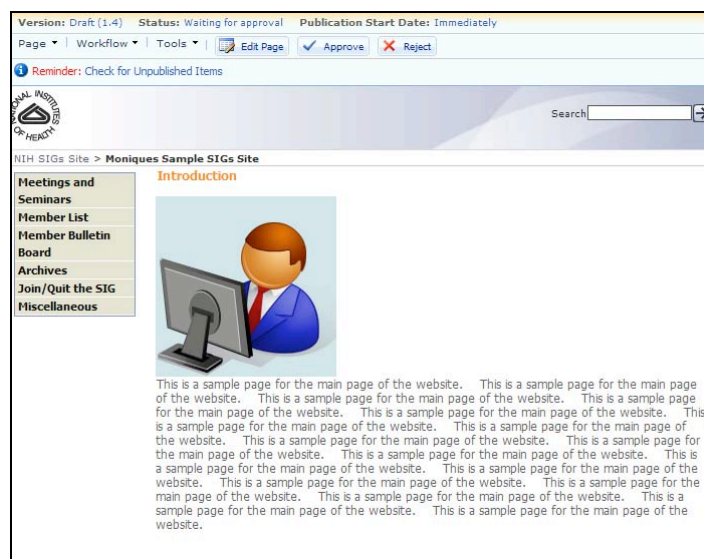
2. Review the page.

Figure 27

3. (Optional) If **Edit Page** is chosen, the text editor opens which allows you to make changes. After editing, you can Approve a page.

4. If Approve is chosen, a Workflow Task screen appears. Choose **Approve** and the page becomes published. An automatic email is sent to the Contributor regarding the approval status.
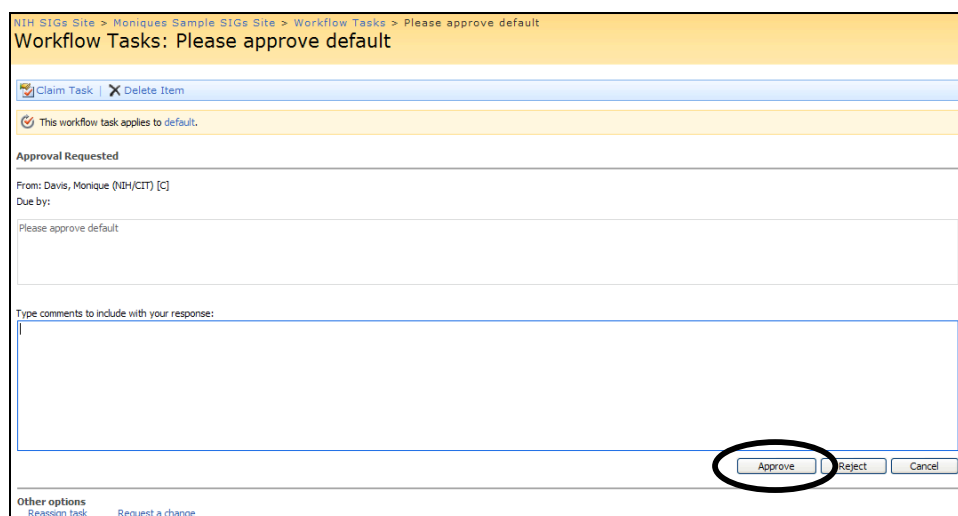

Figure 28

Rejecting Content

1. If Reject is chosen, a Workflow Task screen appears. At the bottom of the page, you can:
   - Reassign task or,
   - Request a change

	Reassign task	If you want to reassign your task to another person use this option.
	Request a change	If the document needs to be changed before you can approve, choose this option to request the change. After the change is made, you will again be asked to approve the page again.

Figure 29

2. Choose **Reject.** The page does will not be published.